

JULY 2025

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A PUBLICATION OF THE ILLINOIS SOYBEAN ASSOCIATION

The  
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# CONTENTS

JULY 2025

Volume 5 Issue 9

## 6 **Bean There, Done That.**

Meet *Bean There*, ISA's International Market Development blog that covers events, conferences, trade missions and farm visits to connect Illinois soy with industry representatives, key trade partners, global buyers and more.

## 10 **Competing on the Global Stage**

*Illinois Field & Bean* investigates how U.S. soy compares to its largest competitors, Brazil and Argentina, by examining key differences in sustainability, production, infrastructure, quality and price.

## 14 **Policy's Growing Role in Farming**

As policies continue to directly and indirectly impact agriculture, ISA's Government Relations team works to ensure farmers have a seat at the table as decisions are made.

## 16 **When Buyers Become Growers**

As global soybean markets continue to shift, how can Illinois farmers stay competitive?

## 20 **In the Field with the 2025 IL Soy Envoys**

Meet ISA's new crop of agronomy experts as they share 2025 growing season strategies and recommendations.

## DEPARTMENTS

### 4 **FROM THE BOARDROOM**

### 5 **CEO'S MESSAGE**

### 24 **PARTNER PERSPECTIVE**

### 26 **VOICE FOR SOY**



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**COVER:** As global markets evolve, *Illinois Field & Bean* is here to keep you informed and empowered. In this issue, we're exploring how U.S. soy production stacks up against competitors, the impact of policy on farming, the latest Illinois Soybean Association (ISA) innovations in export markets and strategies Illinois farmers can use to stay competitive in an ever-changing landscape.





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FROM THE BOARDROOM | Funded by the Illinois Soybean Checkoff

# How Do Our Checkoff Dollars Help to Develop Foreign Markets?



MARK READ | DISTRICT 5 DIRECTOR | ILLINOIS SOYBEAN ASSOCIATION

Illinois exports approximately 60% of the soybeans we grow, which makes it essential that we not only protect the markets we've already built but also work to develop new ones. That need has only grown in recent years, as trade disruptions and tariffs have shaken some of our largest export destinations.

With many uncertainties surrounding global trade, one thing Illinois soybean farmers can count on is this: Our checkoff dollars are being put to work in smart, strategic ways.

In 2019, when President Donald Trump imposed tariffs on China, the U.S. Soybean Export Council (USSEC) recognized the need to put an emphasis on expanding and diversifying our markets. With support from the Agricultural Trade Promotion Program and government approval, the Soy Excellence Centers (SECs) were launched.

Backed by the Illinois Soybean Association (ISA) and other national and state soybean organizations, the SEC program provides early to mid-career protein professionals with training to help meet local nutrition and food security concerns while also supporting economic growth. Located in Central America, Asia, India, the Middle East and North and sub-Saharan Africa, the centers offer specialized courses in poultry, aquaculture, feed milling, swine, dairy and human food utilization.

Through these courses, USSEC stresses the added value and advantages of U.S. soybeans, such as digestibility, amino acid content, reduced heat damage and overall quality. As former Vice Chairman and current Chairman of the SEC Global Advisory Panel, I'm proud to support this effort to educate and empower the next generation of leaders across the global soy value chain.

Along with the SECs, ISA supports a number of programs sponsored by USSEC, and Illinois farmers have great representation on the board, with ISA At-Large Director Scott Gaffner serving as Secretary of the organization. Among those programs is the World Initiative for Soy in Human Health (WISHH), which is celebrating 25 years of developing trade in underdeveloped and emerging markets.

Launched in 2000 with Illinois soybean checkoff dollars, WISHH has grown into a world-class organization serving countries across Africa, Asia and Latin America — including Cambodia, Ghana, Guatemala and Kazakhstan. Even as WISHH has expanded globally, our state is still well represented with five Illinois farmers sitting on the board including myself, Jeff O'Connor, Daryl Cates, Roberta Simpson-Dolbeare and the aforementioned Scott as Secretary.

USSEC, WISHH and the SECs are all trusted partners of the United Soybean Board (USB), where half of our soy checkoff dollars go. USB invests heavily in both domestic and international programs to make sure U.S. soy stays competitive and in demand. And those investments are paying off. Over the past five years, USB has delivered \$12.30 in value for every \$1 invested. I don't know about you, but I'd sure love to see that kind of return on the farm.

Even in times of uncertainty, Illinois farmers can be confident that their soy checkoff dollars are being used wisely. Whether it's through SECs, WISHH or USSEC-led initiatives, we're making strategic investments that ensure long-term demand for U.S. soy—supporting both global food security and our farms back home.





# On the Map and in the Game

Illinois farmers grow soybeans with pride and precision, not just for the U.S. but for buyers around the world. Nationally, between 40% and 43% of U.S. soybeans will be exported during the latest marketing year. Here in Illinois, that figure is closer to 50% to 55%, leading the way nationally for exports over the last several years.

The reasons for this? Quality, consistency, location and dedicated farmers.

Illinois is holding its edge, and international demand plays an even bigger role. That's why in this **Exports Edition** of *Illinois Field & Bean*, your Illinois Soybean Association (ISA) team breaks down what's driving global competition, from shifting policies to strategic tactics we are implementing together to stay strong and grow your market share abroad.

Our cover story this month takes you along on a market development journey through our *Bean There* blog, as we track our team's trade missions to places such as Guatemala, Ghana and the Middle East. These trips aren't just about fact-finding; they're working trade missions focused on building and growing relationships with global buyers. Whether on a farm tour or in a meeting room full of buyers halfway across the world, we're working to make Illinois soy the top pick for international markets.

There's a lot of competition in this fight for market share. In *"Competing on the Global Stage,"* we size up our competitors, specifically Brazil and Argentina. They're big players, and they've got strengths, but we've got our own. U.S. soy, especially from Illinois, wins on quality, consistency and sustainability. The key is making sure buyers know it. This story spells out what sets us apart and what we need to do to stay ahead.

Because production here at home is the first essential step in the global marketing chain, we're also introducing you to our new IL Soy Envoys. These growers and agronomy pros are your boots-on-the-ground resources. They'll provide regional updates through the Field Advisor Crop Report, sharing pest pressures, disease threats, weather conditions, and other field observations, along with timely blog posts as new issues arise. It's peer-to-peer learning at its best, and we're proud to have this fresh crop of envoys on board.

We're also digging into a growing concern: What happens when our export customers start producing their own soybeans? In *"When Buyers Become Growers,"* we look at how countries such as China are boosting their domestic soy production, a move that could cut into global demand for U.S. soy. The story breaks down what's driving this shift and how Illinois farmers can respond. In short, we need to act now — be more innovative and more willing to speak up about why Illinois soy is the better, more efficient choice.



JOHN LUMPE | CEO |  
ILLINOIS SOYBEAN ASSOCIATION

We can't talk farming—exports included—without addressing issues on the policy front. In *"More Than Politics,"* we look at how government decisions such as trade rules or transportation policy can trickle down to impact your bottom line. Our Government Relations team stays on top of it all, making sure you are informed and your voice is heard. It's a good reminder that policy isn't just about politics, it's about protecting your profitability.

Taken together, the articles in this issue tell a bigger story: Illinois soybeans aren't just a local product. They're global. Staying competitive means working hard at every level, from field to boardroom to policy table to end users. We're proud to be doing that work alongside you.

So, enjoy digging into this issue. Learn what we're up against, see how we're responding and find out what you can do to stay ahead. Because when Illinois soy is winning overseas, we're also winning here at home.



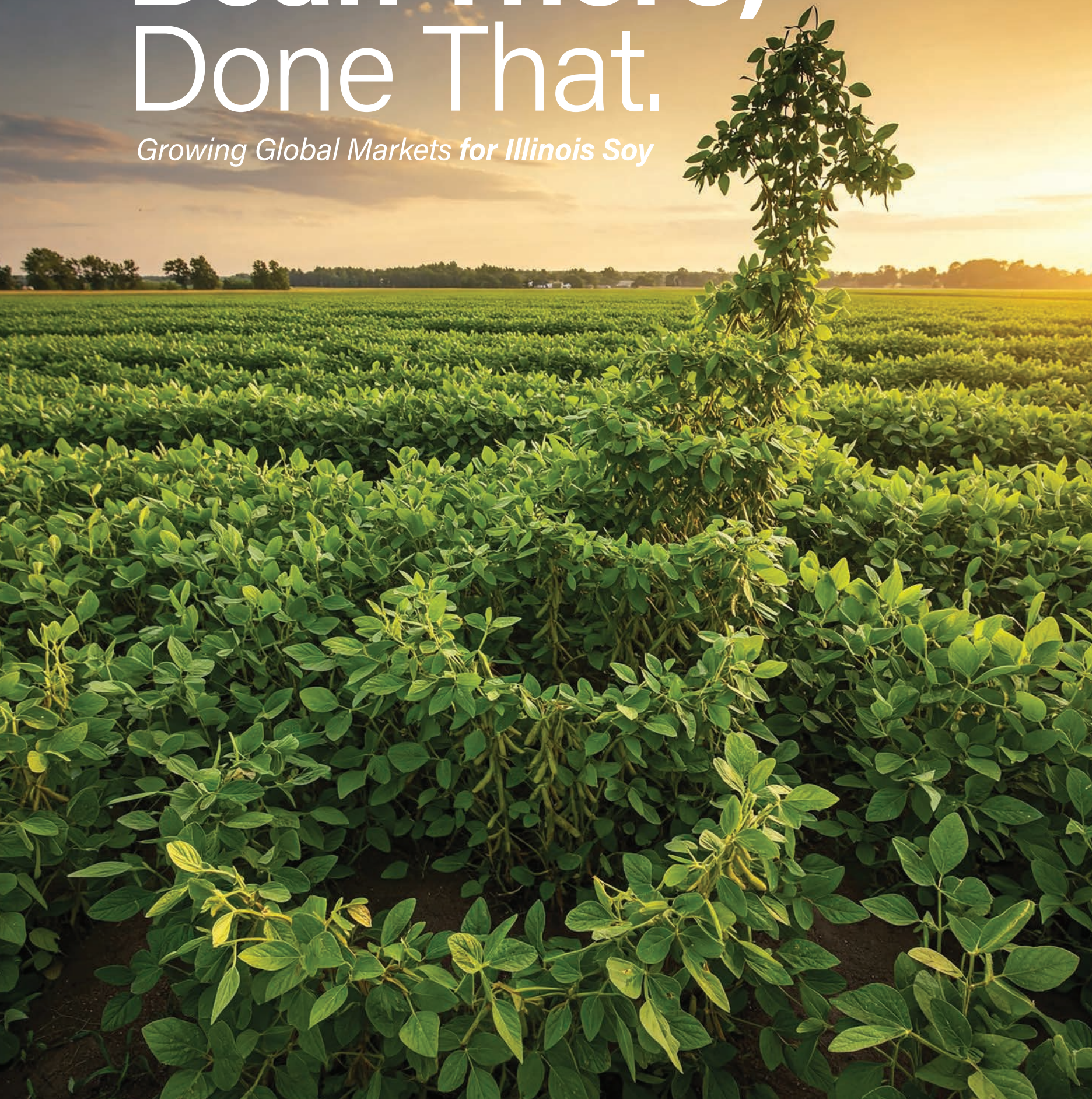




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# Bean There, Done That.

*Growing Global Markets for Illinois Soy*





*Emma Peters, International Markets Coordinator, Illinois Soybean Association*

If you've followed the *Bean There* blog over the past few months, you've seen that the Illinois Soybean Association (ISA) has been on the move, literally. From Guatemala to Ghana and the trade hubs of the Middle East, we've been hitting the road to connect Illinois soybeans with the global marketplace. It's all part of our ongoing mission to make sure Illinois soy remains a trusted, top-tier choice for buyers around the world.

As someone who's traveled alongside our board members, staff and trade partners, I've had the privilege of documenting these stories firsthand along with chronicling the travels of others. These opportunities showcase each level of the value chain and the professionals working to build long-term relationships, secure market access and ensure that the quality and sustainability of Illinois soy are recognized far beyond our borders.

### **Cultivating Opportunity in Guatemala**

On a recent trip to Guate-

mala, ISA At-Large Directors Jeff O'Connor, David Wessel and Scott Gaffner, and American Soybean Association (ASA) Representatives Roberta Simpson-Dolbeare and Daryl Cates, engaged in conversations with local feed manufacturers, government officials and long-standing trade partners. Guatemala is a consistent buyer of U.S. soy, and they've come to associate Illinois with high standards of reliable quality, consistent supply and a commitment to sustainability. This trip served as an opportunity to showcase our commitment to the largest market for U.S. soybean meal and soybean oil in Central America. Efficient transportation and a strong market share encourage growth in the market benefiting local poultry producers while putting dollars back in the pockets of Illinois soybean producers.

For more insights from the farmers' experience in Guatemala, check out Jeff O'Connor's takeaways from the trade mission at [www.ilsoy.org/on-the-farm-and-beyond/](http://www.ilsoy.org/on-the-farm-and-beyond/).

### **Planting Seeds in Ghana**

In Ghana, ISA International Markets Specialist Caitlyn Abbey attended a trade mission with WISHH in the capital of



While in Guatemala, Illinois soybean farmers attended the World Food Security Dialogue, where leaders from government, industry and nutrition sectors gathered to advance sustainable solutions for a more secure food system in the country. *Photo Credit: WISHH*

Accra. In a country so reliant on their poultry and aquaculture sectors, it's clear the demand for U.S. soy is set to increase. Caitlyn witnessed how impactful it was for Ghanaian leaders to hear directly from farmers and professionals, who provided education and raised awareness about Illinois soy. It's more than trade, it's about partnership, which is the sentiment we carry through every trip both domestic and abroad. Connections with feed formulators, poultry producers and agribusiness professionals are part of a

vital first step in growing trade relations in Africa as food security and the broader economic landscape grow in importance.

You can find Caitlyn's full recap of the Ghana trade mission at [www.ilsoy.org/wishh-in-ghana/](http://www.ilsoy.org/wishh-in-ghana/).

### **Strengthening Ties in the Middle East**

Traveling to the Middle East with USSEC and representing ISA, a U.S. soy delegation brought the organization face-

(See *Bean There, Done That*, page 8)



LEFT: ISA At-Large Director Scott Gaffner and ISA International Markets Coordinator Emma Peters recently traveled to Lima, Peru, to participate in the USA Poultry & Egg Export Council's (USAPEEC) 2025 Strategic Planning Conference, where they laid the groundwork for a renewed five-year partnership between the organizations. RIGHT: Poultry production is a crucial sector within Ghana's agricultural industry. Driven by increasing demand for chicken meat and eggs, the country has experienced significant growth in domestic poultry production in recent years, which is valued today at approximately \$1.2 billion. *Photo Credit: USSEC*





## Bean There, Done That.

(continued from page 7)

to-face with some of our most promising markets. ISA Board Director Ryan Frieders visited Saudi Arabia and Turkey, regions where soy demand continues to rise.

At each stop, the delegation emphasized the strength of the U.S. supply chain and the innovation behind Illinois soy production. These conversations were more than business pitches; they were about building relationships grounded in transparency and shared

values. Our presence and investments in the region show we're committed to meeting their needs while building trust face-to-face.

To find more details about the stops Ryan made on his trade mission to the Middle East, visit [www.ilsoy.org/a-journey-to-the-middle-east/](http://www.ilsoy.org/a-journey-to-the-middle-east/).

### Collaborating with External Organizations

Everything we do at ISA is strengthened by collaboration. Our work wouldn't be possible without our close partnerships with USSEC, ASA/WISHH, U.S. Meat Export Federation (USMEF), USA Poultry & Egg Export Council (USAPEEC),

Specialty Soya and Grains Alliance (SSGA), and many more that work on the international level.

These organizations individually develop an annual Unified Export Strategy (UES) before it is combined and adapted across the agriculture industry. It's a process for U.S. ag trade groups to access funding for export promotion programs, enhancing the global competitiveness of U.S. agricultural products. Each year, ISA sends both staff and farmers to these UES meetings for the chance to share perspectives and offer insight to efforts that will support exports.

These groups open doors, provide valuable technical expertise

and help amplify our voice on the international stage. Whether we're attending a conference in South America, visiting processing facilities in Southeast Asia or hosting buyers in the soybean fields of Illinois, they help ensure that Illinois soy stands out in a competitive global market. Thanks to these partnerships, ISA board members can speak directly to farmers' interests, helping shape conversations about sustainability, trade and food security worldwide.

For more information about how ISA collaborates with USMEF and USAPEEC, visit [www.ilsoy.org/how-poultry-and-pork-exports-boost-illinois-soybean-demand/](http://www.ilsoy.org/how-poultry-and-pork-exports-boost-illinois-soybean-demand/).



Each year, ISA hosts multiple trade teams to showcase Illinois farms, equipment, processing and more.



### Showcasing Illinois Farms to the World

As important worldwide travel can be, sometimes the most meaningful connections happen right here at home. Hosting inbound trade teams is one of the most powerful tools we have. When buyers come to Illinois, they see the heart of our soybean industry — our farms, our people and our practices.

These visits often include farm tours, elevator site visits and presentations held in the ISA offices. They're a chance to demonstrate what makes Illinois soy so special. Around the world, people come to Illinois knowing that our farmers are committed to growing high-quality soybeans. From small to large, conventional to specialty and from north to south, each farm is unique.

Just as each farm is different, so are the trade teams. One visit could be educational, and another could lead to a productive business relationship. Although

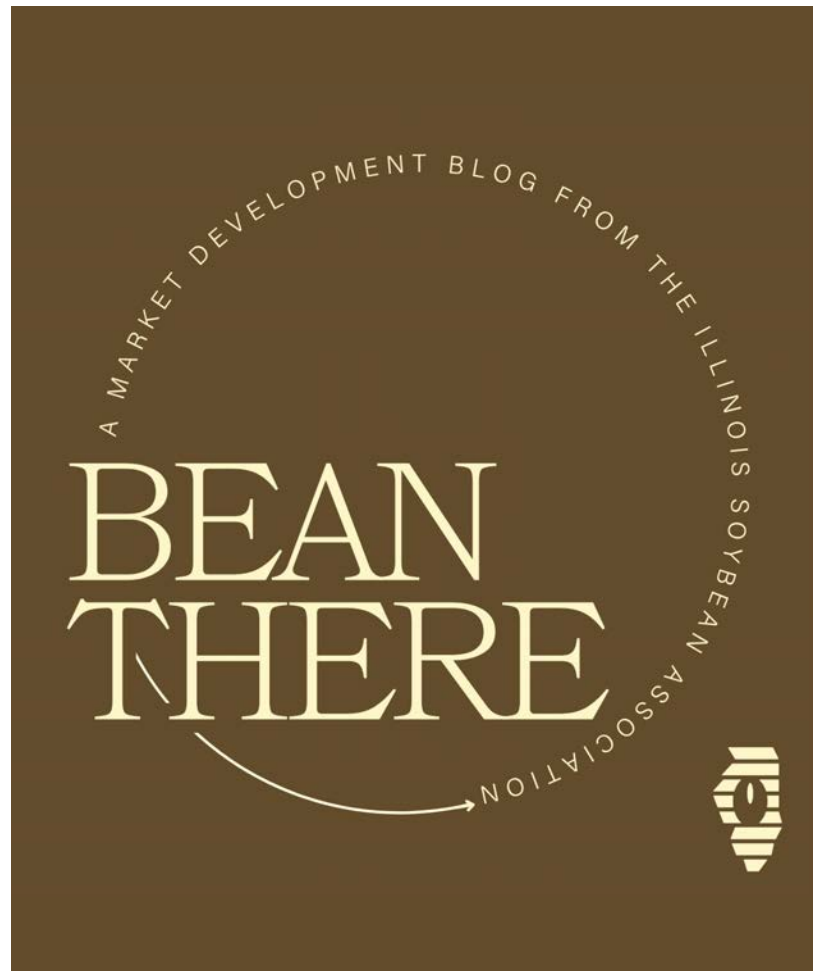
each comes with varying levels of understanding, certain questions always seem to surface. Take a look at the questions visitors are asking in the 'Trade Visit FAQs' post at [www.ilsoy.org/trade-visit-faqs/](http://www.ilsoy.org/trade-visit-faqs/).

### The Bigger Picture

Our work in international market development is about more than promoting Illinois soy. It's also about building a resilient, connected supply chain for the future of Illinois farmers. The travels documented on the *Bean There* blog are just snapshots of a bigger picture: Illinois farmers showing up, sharing their stories and building partnerships that stretch across continents.

So whether it's a conference, a market tour or a farm visit ISA is growing more than markets; we're growing trust, opportunity and global respect for the soybeans grown right here in our fields.

For more *Bean There* blog content, visit [www.ilsoy.org/bean-there-blog/](http://www.ilsoy.org/bean-there-blog/).



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# Competing on the Global Stage

By Ashley Rice-Haddon, Content Manager, Illinois Soybean Association

**I**n this time of shifting political and global dynamics, how do U.S. soybeans stack up on the global stage?

## Production

Today, the top U.S. soybean competitors include the two largest countries in South America—Brazil and Argentina. Globally, the largest producer of soybeans is Brazil, followed by the U.S., Argentina and

China. China is also the largest importer of soybeans, creating competition between the top exporters—Brazil and the U.S. By contrast, the top two exporters of soybean oil and soybean meal are Argentina and Brazil. As reported by the U.S. Department of Agriculture's (USDA's) Foreign Agricultural Service, global soybean production is projected to hit a new record for the 2025/26 marketing year. This is driven primarily by another record crop year in Brazil, despite lower soybean production forecast in the

U.S. Likewise, global soybean consumption is forecast to rise in all major markets except the European Union. This is driven by growth in global feed demand and competitive soybean meal prices. On the oil side, global soybean oil production is forecast to grow to a new record in 2025/26, but higher production in the U.S. and Brazil will likely be captured for domestic use.

## Sustainability

Many factors make up the

sustainability profile of soybeans, including its carbon footprint. Soy's footprint starts on the farm and ends after the crop has been transported to its final market destination. On the farm, everything from soil, water, seeds, crop protection products, fertilizers and fuel play into the carbon footprint. Drying time, transportation to markets and manufacturing processes are also factored in.

"The cultivation aspects are very similar between the U.S., Brazil and Argentina, but where





we do see differences in transportation,” said Abby Rinne, U.S. Soybean Export Council’s (USSEC) Director of Sustainability. “Brazil uses mostly trucking, and in the U.S., we use a lot of rail and barge, which is more sustainable. But the biggest environmental difference we see between the countries is in something called land use change because of the deforestation that has occurred in Brazil and Argentina.”

Land use change involves accounting for the environmental impacts of converting land into cropland. USDA’s Natural Resources Conservation Service reported that from 1997 to 2017, non-federal forest lands increased by more than 1.8 million acres, while cropland decreased by 8.8 million acres. In contrast, Brazil and Argentina have high levels of deforestation taking place, which increases their carbon footprint. From 1997 to 2017, Brazil’s soybean acreage

increased by 54.7 million acres, and Argentina’s soy increased by 23.1 million acres. This can be problematic because when trees are cleared in large quantities, the carbon stored in the trees is released as carbon dioxide into the atmosphere.

When land use change is factored in, emissions modeling shows that U.S. soybeans have a significantly lower carbon footprint than soy from Argentina or Brazil.

In the U.S., advances in in-field technology and precision farming, in addition to seed advancements and adoption of conservation practices, have significantly contributed to making soybeans more sustainable. The latest Field to Market National Indicators Report found that since 1980, U.S. soybean farmers have reduced greenhouse gas emissions per bushel by 42%, increased land use efficiency by 47%, improved soil conservation by 35% and increased soybean production by 130%.

As reported by USSEC, in 2024, 71% of U.S. soybean exports were shipped with a U.S. Soy Sustainability Assurance Protocol (SSAP) Certificate. The SSAP was developed to meet international sourcing requirements and to verify sustainable soy production on U.S. soybean farms. When U.S. soybean customers are able to buy with confidence that knowing that soybeans have been sustainably produced, it gives U.S. soy a global advantage.

### Infrastructure

Infrastructure between Brazil, Argentina and the U.S. varies considerably. “In many parts of South America, producers have to go very long distances to market their soybeans,” explained Eric Woodie, Trade Analyst, Illinois Soybean Association. “This leads to backups where, at times, trucks wait days to unload. Even when the system is running smoothly, delivery to market is much less efficient overall. In

addition, many export flows in South America have little in the way of effective transportation to deliver soy to the export market.”

In contrast, the U.S. has the logistical capacity to load multi-commodity vessels, thanks to both its infrastructure and the availability of diverse feed ingredients. Brazil and Argentina primarily focus on single-commodity shipments, with Brazil concentrating on exporting single-commodity soybean cargos to China.

Over the past decade, U.S. producers have expanded their inland storage significantly to provide producers with the best opportunity to market their grain over the course of the marketing year.

Many parts of South America face challenges with on-farm storage capacity, which is a limiting factor for extended soybean storage. Although the

(See Competing on the Global Stage, page 12)





## Competing on the Global Stage

(continued from page 11)

level of storage shortfalls varies across the region, it is important to highlight that in areas with dual-crop systems, such as parts of Brazil, soybeans can only be stored for a limited time. This is not only because of concerns about quality but also because a second crop, typically corn, follows closely behind and requires the same storage space.

Looking at currency risks, over the past 20 years, the depreciation of the Brazilian real (the official currency of Brazil) has provided exporters with a significant advantage. This currency trend has made the majority of Brazil's export-related costs more competitive when compared to those of the U.S. As a result, Brazil has become a much more competitive player in global markets. Although it is true that Brazil imports

certain farm inputs priced in U.S. dollars, the overall effect of a weaker currency has been overwhelmingly positive for its export sector.

### Quality and Price

Soybeans are widely used for livestock and fish feed around the world. The quality of soybeans is determined mostly by the crop's physical characteristics, nutritive value and economic value. Soybeans from the U.S., Brazil and Argentina each score differently when it comes to physical parameters for a variety of reasons. Data from the Research Center for Aquafeed Nutrition and Fishery Post-Harvest Technology shows that U.S. soybeans consistently score lowest when considering the percentage of split beans, foreign materials present and damaged beans. Overall, U.S. soybeans rated as 92.5% good quality compared to 82.9% for Brazil and 87.5% for Argentina. These and other chemical composition parameters impact the digestibility of soybean meal that is fed to fish. Research has also shown that U.S. soybean

meal has better digestibility characteristics for poultry and swine. These chemical compositions and digestibility characteristics impact the rate of weight gain and growth in fish and livestock, ultimately impacting the profitability of these operations.

Total damage is a key factor when determining the overall quality of whole soybeans. Total damage includes heat damage, mold damage, insect damage and other factors. Soybeans harvested at a higher moisture content are more susceptible to these issues because of the need for more drying time.

"Soybeans grown near the equator are part of a tropical production system, which typically involves high levels of precipitation," said Carlos Salinas, Regional Director, USSEC. "This leads to challenges in maintaining soybean quality. In contrast, regions farther from the equator, such as the U.S., benefit from a more seasonal production system, which tends to result in better quality and lower moisture levels. This difference in

climate plays a significant role in overall soybean quality."

Many areas of South America require drying of soybeans, and the most common method of drying is burning wood to produce heat. But the lack of control with wood drying methods means more heat damage to the soybeans. In contrast, U.S. soybeans have minimal heat damage because most of the time the crop dries naturally in the field or, if drying is needed, gas dryers allow for more precise control of the drying process.

So how do U.S. soybeans stack up on the global stage?

Overall, an increased demand for plant and animal protein will be driven by a growing world population and increased consumer spending power. This will continue to create market opportunities for high-quality U.S. soybeans around the world. Although U.S. soybeans come with a higher price tag, the combination of economic efficiency and sustainability makes U.S. soy stand above the rest for global customers.





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<sup>1</sup>Boyd, R. D., et al. 239 Increasing Dietary Soybean Meal Level Improves Growth and Feed Conversion Efficiency in Healthy Pigs and Reduces GHG Emissions. *Journal of Animal Science*, Volume 100, Issue Supplement\_3, October 2022, Page 122.  
<https://doi.org/10.1093/jas/skac247.233>.

<sup>2</sup>Large scale commercial trials: data on file.

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July 2025 15





# Policy's Growing Role in Farming

*By Collin Cisco, Farm Policy Manager, and Matt Johnston, Government Relations Coordinator, Illinois Soybean Association*

**F**armers have always needed to be experts in much more than just growing crops. Weather patterns, global markets and trade dynamics all play a part in determining profitability. But increasingly, public policy, especially legislation not explicitly labeled as agricultural, is shaping how farmers operate and what they earn.

At the Illinois Soybean Association (ISA), our Government Relations team works to ensure Illinois soybean growers are represented when policies are de-

bated and decisions are made. Even policies that might seem far removed from agriculture can have a direct and lasting impact on farmers' bottom lines.

## **Ripple Effects Beyond Agriculture**

Although agriculture-specific legislation such as the Farm Bill often makes headlines, it is frequently broader policy decisions that affect farmers most. Infrastructure, energy, trade and environmental regulations all influence the cost of doing business and ultimately the price Illinois soybean farmers receive for their crop.

Take transportation as an example. The ability to move soybeans efficiently hinges on a

reliable system of roads, railways, locks and dams. When infrastructure policy fails to prioritize repairs or introduces restrictions that slow movement, farmers pay the price through delivery delays, rising freight costs and reduced commodity prices at market.

Energy policy also plays a critical role. The demand for soy-based biofuels, such as biodiesel and renewable diesel, depends heavily on state and federal support for low-carbon fuels. When incentives are reduced or regulations shift, markets for soybean oil can swing dramatically, affecting planting decisions, processing margins and long-term investments on the farm.

Environmental regulations can create significant ripple effects

across the agricultural economy even when they do not directly mention farming. Rules tied to water quality, pesticide use or greenhouse gas emissions can add compliance burdens, limit access to essential tools and shift production strategies. These policies are often shaped in committees and agencies far outside traditional agricultural channels, yet their impacts are deeply felt across the farming sector.

## **Proactive, Not Reactive**

Because these types of policy changes do not always originate within the ag sphere, ISA adopts a proactive approach to advocacy. Our team closely monitors developments in Springfield and Washington,



evaluating proposed legislation and regulatory shifts to understand how they could affect soybean growers.

We focus on early and consistent engagement. Whether through direct conversations with lawmakers, public comments on proposed rules or collaboration with industry coalitions, we advocate for practical, informed policies that support long-term farm profitability. Our presence ensures that policymakers understand how their decisions translate into real-world outcomes in rural communities across Illinois.

We also prioritize education and farmer engagement. Through regular updates, fly-ins and in-person events, we help keep soybean producers informed and involved. When farmers are aware of what is coming and understand its implications, they can lend their voices more effectively and play a meaningful role in shaping outcomes.

**Why It Matters**

Markets are influenced by far more than just supply and demand. They respond to policy signals, regulatory shifts and political developments long before a crop is harvested and often before it is even planted. A change in fuel standards, new

trade tariffs or evolving environmental rules can all move commodity markets in real time. Illinois soybean farmers deserve policies that reflect the realities of modern agriculture. More importantly, they deserve a seat at the table when those policies are written.

By staying ahead of emerging issues and actively engaging decision-makers, ISA ensures the voice of Illinois agriculture is heard and that the economic foundation of our farm communities remains strong and resilient.



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A combination of global soy market-building and domestic consumption increases can help secure continued purchases of Illinois soybeans, says Dr. Scott Gerlt, Chief Economist, American Soybean Association, pictured here in Brazil. "Market development tends to take many years," Gerlt says. "We have been pointing out to policymakers that domestic demand can be increased quickly by setting higher blending levels for biofuels. These effects are fairly quick and can help create long-term demand." *Photo Credit: Dr. Scott Gerlt, American Soybean Association*



# When Buyers Become Growers

## How Illinois Farmers Can Stay Competitive as Soybean Markets Shift

**A**s soybean markets shift globally, Illinois farmers find themselves in a strategic bind: Countries once dependent on U.S. soy are investing in their own domestic production.

In diverse locations, including China and Kazakhstan, national policies and evolving market dynamics are reshaping how and where soybeans are grown. For Illinois farmers who rely heavily on exports, these trends pose a critical challenge—and a call to action.

Recent shifts in trade policy and global production underscore the fragility of the export-driven U.S. soy economy.

"The U.S. still faces an extra 20 percentage-point tariff disadvantage in China that was imposed this year," says Dr. Scott Gerlt, Chief Economist for the American Soybean Association (ASA). "We already saw China shift their primary focus to South American production after the last trade war. The current trade war rewards that shift while also encouraging other countries to follow suit. While there are reasons that foreign buyers will continue to come to the U.S., there is a real risk that other countries seek to diversify their food supplies away from us."

Although some nations are working to boost their own soybean output, results have been mixed.

"Recently, the Kazakhstan government wanted to increase their soybean production to meet the growing demand in the livestock industry," says Alan Pooch, Asia Director for ASA's World Initiative for Soy in Human Health (WISHH). The initiative seeks to grow soy demand in 28 emerging markets including five in Asia. "Kazakh farmers discovered that soybeans were not as profitable as other crops they have more experience in growing. No matter how successful these local production programs are,

U.S. soy is higher quality and will have a year-round, reliable supply available."

That observation mirrors what Todd Main, Director of Market Development at Illinois Soybean Association (ISA), is seeing across the globe.

"Our overall growth strategy is focused on developing markets in emerging economies where food security is a driving concern," Main explains. "Yes, some countries will seek to develop domestic soybean supplies, but we have found that many countries are better equipped to grow other products and can find a competitive advantage there."

### Production Shifts Amid Changes in Policy, Protein Demand

Illinois is especially exposed to global production shifts because 60% of its soy crop ships to international markets. Any disruption abroad can reverberate quickly through local price structures and basis.

"The market needs certainty to operate," explains Eric Woodie, Trade Analyst, ISA. But federal activity such as the Office of

the U.S. Trade Representative's Section 301 investigation "into Chinese shipping dominance, and the subsequent remedies, do add stress, and subsequently cost, to the system."

To address domestic food security, countries are expanding livestock and aquaculture sectors, which is prompting governments to promote local soy production.

"There are multiple reasons a country may grow soy," Pooch explains. "Some governments and farmers view soy as a high-value crop that can develop rural economies and diversify crop rotation. Feed and human food companies may also view local procurement of raw materials as a corporate social responsibility."

### Strong Potential Remains for Illinois Soy

Yet despite concentrated government efforts to grow soy at home, local production efforts are unlikely to meet growing demand. Although China produced 20.65 million metric tons of soybeans in 2024/25, the country still imported 103 million metric tons and remains the world's largest buyer.

"They remain the world's largest soybean importer, representing 60% of global demand," Woodie says. "Increases in domestic production cannot keep pace with the vastness of their demand."

In his view, the greatest competitive threat for Illinois soybean farmers to monitor is South America, which has aggressively ramped up domestic production for years. That region also has the potential to woo buyers such as China when trade uncertainty with the U.S. looms.

"A strong, predictable U.S. trade policy environment is key to ensuring the world does not over-produce for current demand," Woodie says.

Beyond China, markets such as Southeast Asia remain a growth opportunity for Illinois exports. This trend is particularly evident in countries such as Cambodia, where soymeal demand is on the rise to supply its booming aquaculture industry.

"According to the United Nations Food and Agriculture Organization, aquaculture production in Cambodia increased



Despite trade challenges and increased soy production abroad, Illinois soy remains well-positioned for growth in countries such as Cambodia, whose aquaculture industry is exploding. That's evident on trade visits by Illinois soybean farmers such as Daryl Cates (left), also an ASA Director. Here, he holds a snakehead fish. Photo Credit: Joe Murphy, United Soybean Board



from 14,430 metric tons in 2000 to 348,350 metric tons in 2021," Pooock explains. "Their 16.37% annual growth was higher than subregional, regional and world averages. Cambodia's growth rate was the second highest among 11 aquaculture countries in south-eastern Asia."

### How to Stay Competitive as Landscape Shifts

For Illinois farmers, the key to navigating headwinds such as accelerated soy production abroad lies in strategy, adaptability and partnership.

"Farmers should focus on the things they can control. Are crop insurance options being maximized? What about Farm Bill programs?" Gerlt advises. "Producers should also carefully consider costs to access farm ground. Large outlays for land may not make sense with today's margins. Collectively, farmers do have options to help shape markets through the soy organizations. I'd encourage farmers to engage on these efforts."

Pooock agrees and points to the long-term trade development work supported by ISA and WISHH. "It takes lots of time to develop new markets by building trusted relationships and developing the local capacity," he acknowledges. "Initial sales could be years away. Taking a long-term approach is helpful, and asking how this takes place will be helpful."

Beyond these foundational principles, experts say Illinois farmers can take several proactive measures.

First, engage in trade policy conversations. "Currently, U.S. trade policy is shifting. That means there are countless opportunities for Illinois farmers to have their voices heard," Woodie says. "I think it is critical for farmers to educate themselves on U.S. trade policies and those of our largest export markets and make sure their interests are being represented."

Second, support WISHH and ISA's global outreach initiatives. They're an investment in the future. "WISHH takes a long-term

market development approach that targets the full value chain in markets with high opportunity to become long-term trade partners for U.S. soy," Pooock explains.

Another important initiative is the Soy Excellence Centers, which "transfer technologies, training and best practices that support utilization of U.S. soy," Main adds. "In 2025, we are on track to train over 20,000 career professionals in markets across the world."

Meanwhile, the newly announced Soy Innovation Center will continue breaking down barriers to soy use in commercial applications, Main says. This will meet demand for products made from renewable materials that can be substituted for petroleum or chemical compounds of concern.

Third, farmers should keep a close watch on basis levels and transportation costs, particularly as global policies evolve. "Tariffs by other countries on U.S. soy reduce the price received by farmers. Futures prices will reflect the decreased overall demand," Gerlt

says. "But farmers that send their crop to the Mississippi for export markets will be further hurt by weakened basis."

Fourth, market diversification is another tool for resilience. "Long-term demand growth will be needed as South America keeps expanding production," Gerlt notes. "Research and development to identify and open new markets will be critical for growers."

Finally, Woodie recommends doubling down on sustainability and traceability. "Illinois is a global leader in producing a high-quality, sustainable, efficient product, and the world recognizes that," he says. Certified, traceable soy gives Illinois farmers an edge in meeting buyer expectations and gaining access to premium markets.

In the face of growing global competition and trade uncertainties, Illinois soybean farmers stand at a crossroads. The choices they make now—to advocate, adapt and lead—will determine how successfully they navigate a changing landscape and seize tomorrow's opportunities.



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# In the Field with the 2025 IL Soy Envoys

## ISA's new crop of agronomy experts share growing season strategies

By Stephanie Porter, CCA and Outreach Agronomist and Kelsey Litchfield, Agronomic Outreach Manager

**E**very growing season brings a new set of challenges—and opportunities. Illinois farmers must navigate in-season headwinds, evaluate management decisions and look for ways to improve the next year's crop.

They're constantly making high-stakes decisions.

That's where we come in. Through the Illinois Soy Envoy program, we at the Illinois Soybean Association (ISA) are helping farmers make informed and timely management choices with trusted guidance straight from the field.

Launched in 2015 in partnership with Illinois Certified

Crop Advisers (CCAs), the Soy Envoy program was built on a simple but powerful idea: deliver unbiased, practical agronomic recommendations to farmers exactly when they need them.

Our goal hasn't changed, but our methods have evolved. Today, we share updates through the *Field Advisor* blog, podcast and social media platforms. We meet farmers where they are and in the formats they prefer.

### About Our IL Soy Envoys

Each year, we select a small team of agronomic professionals from across the state to serve as our Soy Envoys. These individu-

als walk fields, scout crops and share real-time observations. Their insights reflect the diversity of conditions across Illinois. Their recommendations aren't cookie-cutter. Instead, they're grounded in firsthand experience, tailored to regional challenges and backed by ISA checkoff dollars to ensure objectivity and relevance.

The Soy Envoy program fosters trusted connections not only between agronomists and farmers, but also among crop advisers, researchers and industry professionals statewide. That collaboration is key to ISA's broader mission of supporting farm profitability through on-farm research and region-specific agronomy.

The 2025 class of Soy Envoys reflects that mission. Chosen through a competitive application process, this year's team brings soybean expertise in topics such as fertility management, conservation, pest and weed control, and production of high yields. We've intentionally selected Envoys from different regions so farmers across Illinois can benefit from locally relevant insight.

We're proud to welcome this new crop of Soy Envoys and know they'll add value to your growing season. We invite you to meet the Soy Envoys and learn their soybean growing-season strategies in the pages that follow.





# Soybean Growing Season Tips From The 2025 IL Soy Envoys

## Mike Wilson, CCA

*Region Represented: Southeastern Illinois — from Crawford County west to Highway 57, south to Kentucky and east to the Wabash River*

**Title: Specialty Products Marketing Manager**

**Organization: Wabash Valley Service Company**

### Fun Facts:

- Started in the ag industry in the 1970s and once sold grass seed to NBA legend Larry Bird.
- Has experience spanning seed quality control, sales and biological inputs.
- Passionate about treating soybeans with the same precision as corn: "Soybeans need TLC from Memorial Day through Labor Day."

### 2025 Soybean Growing Season Recommendations:

- **Prioritize Management:** You cannot pay too much attention to your soybean crop. Stand counts are just as important in soybeans as in corn. Keep those beans growing. Check for deficiencies and pest issues.
- **Protect Leaf Canopy:** Remember, this is really simple: Leaves are a solar collection device. No sunlight means no energy! If you want to stress your beans to shorten internodal distance, do it early. Do not damage leaf tissue.
- **Break the Mold:** If you aren't satisfied with your soybean yields, blow up your strategy. The biggest yield limiting factor is the phrase, "Well, that's the way I've always done it."
- **Try Something New:** Pick out two or three new practices or products to try each year. With today's tech, on-farm research is easier than ever. If you struggle with the tech side, find a trusted adviser—that's what CCAs are for.



## Dr. Matt Montgomery, CCA

*Region Represented: Central and West Central Illinois (south of Decatur)*

**Title: Agronomy Education Lead**

**Organization: Beck's Hybrids**

### Fun Facts:

- Served nearly two decades with University of Illinois Extension.
- Known for clear, practical agronomy insights and frequent fieldwork.
- Passionate about lifelong learning: "Be a season-long learner."

### 2025 Soybean Growing Season Recommendations:

- **Slow Down to Get It Right:** Soybean management is a lot like math homework. Most of the time, the job is to "get it done right" and not "get it done quickly."
- **Start Strong:** How you start the season influences how you end the season. If we neglect depth checks, soil conditions or starting clean, we put limits on yield potential.
- **Scout and Learn:** Get a notebook, scout like crazy, write down your observations and then write down ideas about how you can avoid those issues next time around.
- **Nudge Planting Earlier:** Earlier planting adds bushels. Don't feel like you have to make a huge change all at once—nibble at the cookie and shift gradually.





**Haley Brokate, CCA**

*Region Represented: East Central Illinois (Champaign, Vermilion, Douglas, Edgar and Clark counties)*

**Title: Key Account Manager**

**Organization: Illini FS**

**Fun Facts:**

- Active Illinois CCA Board member.
- Six years of agronomy sales experience.
- Known for proactive problem-solving and relationship-building with farmers.

**2025 Soybean Growing Season Recommendations:**

- **Plan Ahead for Weeds:** It's critical to keep fields clean from the start. Plan to start controlling winter annuals in the fall.
- **Use Layered Residuals:** Ensure you have a proactive approach using overlapping residuals. No soybean trait platform is bulletproof.
- **Scout to Stay Ahead:** Waiting until there's a problem usually costs more in both time and yield. Scouting helps anticipate what might need to be tweaked in future passes.
- **Adjust with Insight:** Recurring issues from scouting—diseases, nutrient deficiencies, weed escapes—should inform next year's crop plan.



**Torey Colburn, CCA**

*Region Represented: North Central Illinois*

**Title: Midwest Conservation Agronomist**

**Organization: American Farmland Trust**

**Fun Facts:**

- Independent agronomist turned conservation advocate.
- Promotes cover-crop integration into soybean systems.
- Encourages reflection: "Be your own worst critic."

**2025 Soybean Growing Season Recommendations:**

- **Plant Early:** The data show significant yield advantages when you can get beans planted early. Soybeans are more forgiving than we think.
- **Scout Smart, Act Fast:** Timely herbicide applications are essential. Missed opportunities are usually what lead to waterhemp disasters.
- **Try New Strategies:** Don't be afraid to change your management. Using cereal rye as a cover crop could be key to solving persistent issues.
- **Reframe Challenges:** Ask not "Why did my herbicide fail?" but "How can I manage differently?" Innovation starts with better questions.



## **Byron Hendrix, CCA**

*Region Represented: West Central Illinois*

**Title: Owner and Agronomist**

**Organization: Agronomy 1st LLC**

### **Fun Facts:**

- Certified Crop Advisor since 2003.
- Deeply experienced with Corteva's Enlist Weed Control System.
- Expert in tank-mix adjuvants and weed identification.

### **2025 Soybean Growing Season Recommendations:**

- **Use a Two-Pass Program:** Utilizing a two-pass weed control system (pre-emergence or burndown, followed by post-emergence) is key to clean fields.
- **Spray Small Weeds:** Spray summer annual weeds at 4 inches or less. Control at this stage gives beans the best chance to canopy.
- **Match Population to Plant Type:** Match planting population to soybean plant characteristics to achieve a lush, full canopy.
- **Tailor Tillage:** Know your weed profile before tilling. Large-seeded versus small-seeded weeds require different strategies, especially if planting is delayed.



## **Seth Wiley**

*Region Represented: Northern Illinois (LaSalle, Lee, Ogle, and DeKalb Counties)*

**Title: Farm Manager**

**Organization: Babson Farms Inc.**

### **Fun Facts:**

- Works closely with tenants on cropping decisions.
- Still active in his family farm.
- Integrates crop insurance, drainage and agronomy.

### **2025 Soybean Growing Season Recommendations:**

- **Plant Early:** Plant beans in April. Your goal is to have soybeans flowering by the summer solstice.
- **Corn-on-Corn Bonus:** Fields with a corn-on-corn history have consistently shown higher soybean yields.
- **Watch for Halo Effect:** Early planted soybeans with BASF's ILEVO seed treatment might show a "halo effect" in cooler temps. It's not usually a yield robber, but it's something to note when selecting treatments.
- **Use Checkoff Resources:** Learn more about herbicide sensitivity and seed treatment interactions through ISA checkoff-funded research.







# Five Questions to Ask Before Making That Big Tractor Investment

By David Soliday, Senior Marketing Manager, Tractors, Fendt North America

**N**o matter the market conditions, buying a large tractor or another piece of equipment isn't just another line item on the farm budget. It's a serious commitment, especially in today's tough environment.

With tight margins, changing commodity prices and rising interest rates, financing a new machine is a big decision that can significantly impact your operation. If you want every dollar to count, you need to ensure the machine is the right fit, not just for today, but for five or 10 years down the road.

I've spent years speaking with farmers contemplating a purchase, and these are the questions I think you should be asking to find the machine that best fits your farm, improves your operation and delivers a real return on investment.

Let's dig in.

## 1. What are your operational needs in the short and long term?

Start with your operational needs. What will you use the tractor for, and what's lacking in your current equipment?

Will it be used mainly for tillage and planting, or do you need an all-around machine for tasks such as loading or mowing?

Since this is a major investment, don't forget to take your future needs into account. Is your operation expanding or scaling back? What other equipment do you have, and how will this machine fit into your fleet?

If you're growing your acreage or taking on more work, sizing up might make sense. But if you're scaling back or need versatility, a smaller machine could be the better choice. Today's smaller machines can be surprisingly powerful, so the trade-offs might not be as big as they seem.

## 2. How will this tractor fit into your current setup?

A tractor doesn't work in a

vacuum. It's part of a system. Think through how it will work with your current equipment and implements. You don't want to discover that your new machine isn't compatible with what you already own or requires additional purchases to be usable.

Also, consider how it integrates with your data platform. Today's machines are highly advanced, which brings benefits but also complexity. Fortunately, modern platforms such as PTx Trimble Ag Software allow for seamless data transfers across mixed fleets, reducing compatibility concerns and allowing farmers to aggregate all their data in one place.

## 3. What's the tractor's history and service record?



This is especially important when buying used, but it's still relevant for new purchases.

If you're buying used, check the brand's reputation and evaluate how the equipment was maintained. Was it serviced regularly and by whom? A clean service history can offer peace of mind.

For new machines, ask about warranties or maintenance programs. These not only simplify ownership but can also boost resale value down the line.

#### 4. Who's supporting you after the sale?

Even the best machine will need service eventually, so consider the support system.

Consider whether the dealer has a location near you, how quickly they can deliver parts, how good they are at picking up the phone and whether they will come out to your farm for service calls. Those are all important things to take into account.

After all, when it matters most, downtime can cost more than your tractor payment.

#### 5. What do you value most in a tractor?

Finally, think about your priorities.

Is service and support your top concern? Are you focused on fuel efficiency? What about comfort, especially during long hours in the cab?

Or is cutting-edge technology your priority? Are you looking for the latest in autonomy features?

Think about what you value most in your current equipment, or what you find the most lacking, and that can help make your priorities clear.

Asking the right questions can help you make a decision that pays off for years to come. It's not just about what's on the spec sheet; it's about how that machine fits into your farm, your goals and your future.



David Soliday, Senior Marketing Manager, Tractors, Fendt North America



## FARMER FORUM: Building Your Conservation Program and Profit Potential

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# A Whirlwind Finish

In the early morning hours of June 1, the Illinois General Assembly concluded its spring 2025 session. Seasoned observers noted that while there was no action on major initiatives for most of the year, the final two weeks contained a flurry of activity. A few of these topics were important to agriculture, and the team at Illinois Soybean Growers (ISG) engaged actively to stand up for agriculture.

Over 400 pieces of legislation ended up heading to Governor JB Pritzker for his signature. ISG was pleased to see positive action on efforts to help manage deer populations for landowners, to create a new continuing education option for pesticide applicators, and to expand the framework to allow accelerated infrastructure project delivery including bridge bundling.

Another major victory was the passage of SB1697, which delivers meaningful protection and compensation for agricultural landowners affected by carbon capture and sequestration (CCS) pipeline projects. It includes provisions proposed by ISG that increase compensation for damages to crops, soil, drainage systems and structures, with payments based on local yield and price data. Landowners have the right to submit their own compensation estimates, and farmland must be restored to its original condition. Construction is restricted during periods of excessive soil moisture, and the Illinois Department of Agriculture has the authority to halt work if standards are not met.

The bill also addresses the use of underground pore space for carbon storage. Developers must secure consent from owners of at least 75% of the surface area involved, and nonconsenting landowners must receive equal compensation. Clear timelines for payment and legal recourse are established, allowing landowners to recover damages and attorney's fees in court if necessary. These enhancements of protections in the law help improve the situation for landowners. However, ISG remains committed to opposing the use of eminent domain for these projects.

This session also saw increased interest in revamping and lessening the burden of Illinois estate tax law. The ISG Government Relations Committee of farmer leaders voted in November to pursue a plan requesting relief for a majority of estates that pay taxes. It called for this to be done in a way that is revenue neutral to reduce any effect on state revenue. ISG met with several dozen legislators and found good support for reforming the estate tax system in this manner. A chief complaint is that it is incredibly complex to understand, and planning for paying estate taxes has become more challenging under current law. In the coming months and next legislative session, ISG will remain committed to improving our estate tax system and to reducing burdens on family farms and small businesses.



ANDREW LARSON | DIRECTOR OF GOVERNMENT RELATIONS & STRATEGY | ILLINOIS SOYBEAN ASSOCIATION

With state budgets growing tighter each of the past few years, two other funding concerns topped ISG's list for engagement at the end of session. First, ISG and other partners have long supported the Fall Covers for Spring Savings program, which provides a \$5-per-acre discount on crop insurance premiums for land enrolled in the program.

This program is incredibly popular and fills up rapidly each year. ISG has supported increasing the program to as much as 1 million acres. Unfortunately, because of budget cuts, the modest gains seen in last year's budget were proposed to be cut. ISG's efforts directly resulted in the restoration of funding to the current level supporting over 200,000 acres.

Finally, we witnessed an unexpected fight to save the biodiesel sales tax exemption in Illinois. This program, first enacted in 2003, has made Illinois a leader in the use of biodiesel, largely made from soybean oil. In 2022, ISG passed an extension of this program and expanded the blend threshold to reach B20 blends next April. This supports the use of soybean oil from over 100 million bushels of soybeans annually in Illinois. This is a huge driver for the demand and use of soybeans here in Illinois. Unfortunately, since this program exempts gallons of diesel fuel from paying sales tax if they contain the minimum content, it was seen as a quick revenue source to pay for budget shortfalls. ISG and key legislator advocates including State Senators Koehler and Joyce as well as State Representative Eva Dina Delgado and others fought to keep this demand driver intact.

The end of session in Springfield rarely ends the way everyone thought it would. One thing that has changed is that agriculture has a stronger voice in Springfield today than in past years. Our team at ISG has been building momentum for the past few sessions and looks forward to advancing and protecting the needs of Illinois farmers in Springfield in the next session.







# SOYBEAN BIODIESEL BLENDS

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In 2024, Illinois farmers planted 10.8 million acres of soybeans and harvested an average of 64 bushels per acre. If sold today at \$10 per bushel, \$7 billion would be generated in Illinois. Soybean biodiesel blends alone would be responsible for 10% (\$700 million) of that revenue. <sup>[4][5]</sup>

Returns On Your Investment Today:

A minimum of 10% of the revenue generated from soybean harvest is because of biodiesel demand. It only takes one bushel of soybeans to produce 1.5 gallons of clean usable biodiesel. <sup>[1]</sup>

- 300 soybean acres x 64 bushels x \$10 beans = \$192,000 net revenue.
  - A 1-year realized farmer return from the biodiesel market is more than \$19,000 using 300 acres farmed.



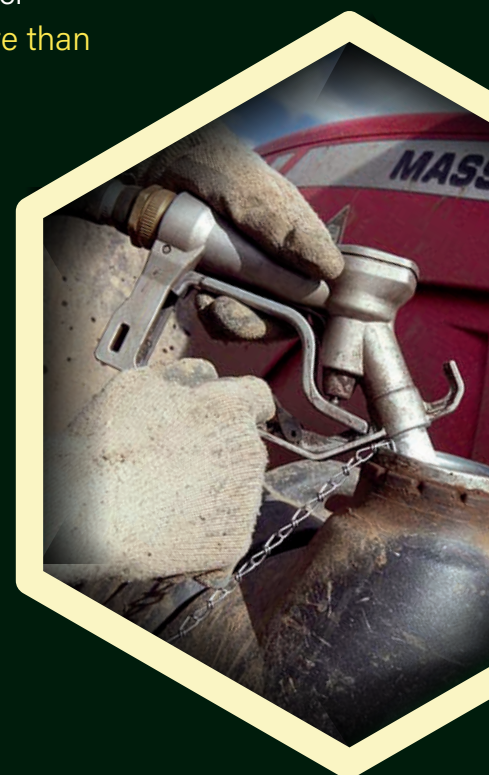
Illinois soybean biodiesel blends are a sustainable feedstock choice that provide fuel alternatives and create domestic energy security for Americans, while decreasing consumer demand for traditional petroleum diesel. <sup>[2][3]</sup>



Cold temperatures cause gel buildups. Soy biodiesel blends perform more efficiently with better tested cold flow and lubricity than other feedstocks. <sup>[6]</sup>



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**July 31:** Illinois Soybean Association - Bloomington, IL

**August 6:** Rend Lake Community College - Ina, IL

**August 7:** Richland Community College - Decatur, IL

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